

HUMAN RESOURCES DEPARTMENT

San Luis Obispo County

PROPERTY TRANSFER TECHNICIAN I, II, III, IV

DEFINITION:

Under the direction of the section supervisor, performs a variety of duties in the transfer of property ownership and/or exemptions for tax assessment purposes; and performs other related duties as required.

DISTINGUISHING CHARACTERISTICS:

Property Transfer Technician I is the entry level class in the series. Incumbents work under close supervision while learning basic assessment/property transfer/exemption duties, policies, and procedures.

Property Transfer Technician II is the journey level class in the series. Incumbents work under supervision and perform progressively more difficult property transfer and/or exemption assignments.

Property Transfer Technician III is the advanced journey level class in the series. Incumbents work under general supervision and perform complex property transfer and/or exemption duties; may assist in providing training, and technical work direction to subordinate staff.

Property Transfer Technician IV is the advanced level class in the series. Incumbents work under general supervision and perform the most complex property transfer and/or exemption duties; may coordinate the work of and provide training and technical direction to subordinate staff; may act as specialist or section lead-worker.

REPRESENTATIVE DUTIES:

(Not in order of importance)

- Reads and interprets documents relating to property transfers of title and/or exemptions, including trusts, court orders, and other legal documents.
- Scans and indexes forms into the imaging workflow system.
- Utilizes/interprets appropriate State laws and codes to determine if a property transfer is to be reassessed and/or if an exemption is applicable.
- Works with attorneys, title companies, local organizations, and state and local agencies to resolve discrepancies for assessment, title and/or exemption purposes.
- Processes assessment ownership information and/or exemption information using current formatting as defined by state guidelines, office policy and procedures.
- Verifies accuracy of information entered on various assessment and/or exemption documents; takes action to correct inaccurate or incomplete data identified in various documents.
- Calculates assessment and/or exemption percentages.
- Enters, researches, processes and maintains a large volume of property assessment documents with a high degree of accuracy and independence.

- Correlates information from various sources to reach property transfer/exemption decisions.
- Assists/educates staff and the public about various assessment and/or exemption situations in person, by telephone, and through correspondence.
- Explains the application and interpretations of various Revenue and Taxation, Government, Civil, Probate codes, and related codes, statutes, and regulations.
- Reads and interprets legal descriptions on legal documents.
- Prepares a variety of reports and correspondence.
- May participate in the design, development, and implementation of systems, workflow, procedures, and/or policies to be used in the Assessor's office.
- May be called upon to assist, coordinate, or serve on special projects or teams.

In addition:

Property Transfer Technician II

- Determines and may prepare corrections to assessment rolls past and present.
- May participate in field inspections of properties for assessment and exemption purposes.

Property Transfer Technician III

- May review pending revisions to assessment rolls prepared by subordinate staff.
- May train and mentor subordinate transfer/exemption staff.
- May review and approve correspondence of subordinate staff.
- May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

Property Transfer Technician IV

- May present cases and appear as a witness in equalization hearings before the Assessment Appeals Board, or in court.
- May participate and/or lead in the development and implementation of policies to be used in the Assessor's office.
- May supervise the transfer section, when directed, in the absence of the supervisor.

EMPLOYMENT STANDARDS:

Knowledge of:

- Oral and written communication skills
- Interpersonal skills using tact, patience, and courtesy
- Provisions of the California State Constitution, Revenue and Taxation Code, Probate Code, and other codes regulations and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Various methods and documents used to convey beneficial interest and/or title to real property
- Transfer and exemption principles, methods, procedures, and terminology pertinent to transferring/exempting real property for ad valorem property taxation
- Common methods of describing real property
- Legal descriptions, and mapping practices and procedures used in the Assessor's office
- Resources to resolve title discrepancies
- General office procedures, practices, and machines
- Basic mathematics including fractions and percentages
- Basic personal computer usage and common software

In addition:

Property Transfer Technician II

- Assessor's office organization, procedures, and standards as well as strategic direction and goals
- Computer applications pertinent to property transfer and exemption functions

Property Transfer Technician III

- Principles of leadership and training

Property Transfer Technician IV

- Accepted methods of employee training supervision and work planning

Ability to:

- Follow written and oral instructions
- Accurately, tactfully, clearly and concisely convey difficult assessment laws and procedures both orally and in writing
- Analyze transfer and/or exemption problems, prepare sound recommendations and adopt effective courses of action
- Perform duties under pressure and with many interruptions while maintaining a balance between accuracy and quantity
- Use sound judgment in researching, interpreting, applying and explaining appropriate laws, codes, ordinances, regulations, policies, procedures, and guidelines
- Read and interpret maps and legal descriptions
- Embrace and follow Assessor's office policies, goals, guiding principles, and the Mission – Vision – Values Statement
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Operate a computer and assigned office equipment
- Maintain a safe and orderly work area

In addition:

Property Transfer Technician II

- Determine and accurately prepare multiple types of roll collections
- Field inspect properties for exemption and assessment purposes

Property Transfer Technician III

- Train, mentor, and lead subordinate staff

Property Transfer Technician IV

- Provide testimony and reports for equalization hearings before the Assessment Appeals Board, or in court
- Coordinate the work of others and communicate department needs to supervisors

EDUCATION/EXPERIENCE:

All levels: Graduation from high school or possession of a G.E.D. certificate.

In addition to the above:

Property Transfer Technician I: One year of experience in an Assessor's office, title company, estate planning office or similar business working with legal descriptions and/or legal documents related to real property transactions.

Property Transfer Technician II: Either A: One year of experience as a Property Transfer Technician I with San Luis Obispo County. Or B: Two years of experience performing duties comparable to a Property Transfer Technician I in an Assessor's Office. Or C: Three years as a Paralegal in estate planning/administration, corporate law office or similar business working with legal descriptions and/or legal documents related to real property transactions.

Property Transfer Technician III: Either A: Two years experience as a Property Transfer Technician II with San Luis Obispo County. Or B: Three years of experience performing duties comparable to a Property Transfer Technician II in an Assessor's Office.

Property Transfer Technician IV: Two years as a Property Transfer Technician III in San Luis Obispo County.

LICENSES/CERTIFICATES:

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver's license will be required at the time of appointment and must be maintained throughout employment.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential functions of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. If you have any questions regarding the duties or the working conditions of the position, please contact the Personnel Department at (805) 781-5959.

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